



REQUEST FOR ASSISTANCE (RFA) FORM INTAKE INTERVIEW LOG

<u>Date:</u>	<u>Interviewer:</u> CM and DN	RFA #18-
<u>Name of Person(s) Requesting Assistance:</u> [REDACTED]		
<u>Contact Numbers (telephone, e-mail, etc.):</u> [REDACTED]		
<u>Status of Person(s) Interviewed (title, position, student status, etc.):</u> Pro Staff		
<u>Requested Assistance Pertaining To (name, position, policy, project, etc.):</u> WWU Retirement Policy		

To the best of your knowledge, please fill out the following:

Interviewee Status: Male ☐ Female ☒ Administrator ☐ Faculty ☐ Staff ☐ Student ☐
 Concern Regarding: Male ☐ Female ☐ Administrator ☐ Faculty ☐ Staff ☐ Student ☐

Category: *(Please check at least one)*

- | | | | | |
|--|--|---|-------------------------------------|--|
| <input checked="" type="checkbox"/> Age | <input type="checkbox"/> Color | <input type="checkbox"/> Creed | <input type="checkbox"/> Disability | <input type="checkbox"/> Veteran Status |
| <input type="checkbox"/> Marital Status | <input type="checkbox"/> National Origin | <input type="checkbox"/> Race | <input type="checkbox"/> Religion | <input type="checkbox"/> Retaliation |
| <input type="checkbox"/> Sex/Gender | <input type="checkbox"/> Sexual Harassment | <input type="checkbox"/> Sexual Orientation | <input type="checkbox"/> Employment | <input type="checkbox"/> Genetic Information |
| <input type="checkbox"/> Gender Identity or Expression | | | | |

Time Line		
Date	Item	Comments
10/29/18	[REDACTED] email to SGS	[REDACTED] email to SGS expressing concern related to the WWU retirement plan. [REDACTED] indicated the contribution amount, which is based on her age and is un-revocable and cannot be changed, is presenting a financial hardship to her. [REDACTED] indicated she viewed the inflexibility of the plan as administrative convenience for WWU HR and found it very inflexible.
11/9/18	CM Phone call to [REDACTED]	No answer, CM left VM
11/13/18	CM phone call with [REDACTED]	CM spoke to [REDACTED] and indicated she wanted to do some initial research prior to meeting with her. CM scheduled a meeting with [REDACTED] and DN on 11/21
11/13/18	CM phone call with Kathy Thompson	CM phone call with Kathy Thompson, CM asked if she and DN could come to HR and ask questions about the retirement plan. CM scheduled a meeting with Kathy at HR for 11/20.
11/20/18	CM and DN met with Kathy Thompson in HR	CM and DN met with Kathy Thompson in HR. Kathy provided information relating to the WWU RP. Kathy indicated once a person qualifies for the plan, they have a window of time in which to make the selection of either the WWU

		retirement plan, or a DRS retirement plan. Kathy said there is an option to waive contributions for 2 years, but once the 2 years has passed, contributions are automatically made. The contribution amount is set by age bands (under 35, 35-50, over 50) and cannot be changed or modified. Kathy explained all contributions are maxed by the University, and a person is vested in the account from day 1. Kathy said WWU is required to offer a retirement plan, and WWU's plan is the same as the plan at WU and CWU. Kathy said the plan was designed to be comparable with other plans offered in the PERS system. Kathy said an employee cannot stop or change their contribution amount while they are working at WWU.
11/21/18	CM and DN met with [REDACTED] in the EO office	<p>[REDACTED] met with CM and DN in the EO office. [REDACTED] indicated she is part of the WWU RP and based on her age is required to contribute 7.5% to her account. [REDACTED] indicated she is still paying on a mortgage on a condo in Chicago and paying rent locally, which has created a financial hardship for her. [REDACTED] indicated she did not feel like the plan was explained to her very well when she was given information by HR and was not aware of the waiver option. [REDACTED] also indicated she did not know that the contribution amount could not be changed. [REDACTED] expressed concern relating to the hardship this plan places on older individuals, who are required to contribute a greater amount than younger employees. CM and DN explained that while they were sorry for her financial hardships, her concerns related to the WWU RP did not appear to present an issue of discrimination based on age, which would be required for the EO office to have jurisdiction. Regardless, CM and DN indicated they would be happy to provide feedback to HR relating to better emphasizing the WWU RP structure and waiver option to new employees.</p> <p>CM and DN expressed that if [REDACTED] has any other concerns she is always welcome to visit the EO Office again. [REDACTED] indicated she understood, and thanked CM and DN for meeting with her.</p>
RFA CLOSED		